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## **Poland**

## **Poultry and Products**

## **Annual**

## **2001**

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### **Report Highlights:**

**In 2001 and 2002, poultry meat production in Poland is expected to increase due to a strong consumer demand resulting from the concerns with beef and substitution of pork in sausages. Imports of poultry meat from the U.S. increased by 24 percent in 2000. However, Poland's introduction of a zero tariff rate quota of 21,000 tons for the EU may adversely affect U.S. exports in 2001 and 2002.**

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Includes PSD changes: Yes  
Includes Trade Matrix: Yes  
Annual Report  
Warsaw [PL1], PL

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## I. Situation and Outlook

In 2001, poultry meat production is expected to increase to meet strong consumer demand partially a result of the concerns with beef. Most of the increase will occur in chicken broilers and turkey meat production. Output is expected to continue to grow in 2002 as profitability improves with declining input costs. Feed costs are expected to decrease during the second half of 2001 and the first six months of 2002 due to a 15-percent increase in the domestic grain crop for the year. It is expected that increase of prices for pork in the last quarter of 2001 and first half of 2002 will stimulate substitution of pork by poultry meat.

In 2000, over 90 percent of Poland's poultry was produced in large commercial facilities. The remainder came from smaller, less intensive household flocks. Of the poultry produced on commercial farms, 74 percent were chicken broilers, 22 percent was turkey and 3 percent was water fowl (geese and ducks) . Turkey is primarily used for further processing while ducks and geese are normally exported to the European Union (EU).

Most of the large poultry slaughterhouses maintain facilities for further processing of poultry meat for sausages and smoked products. In 2000, production of processed poultry products was 150,000 tons, up from 140,000 tons in 1999. Almost 71 percent of the domestic broiler production is processed by 30 large slaughterhouses. Most large slaughterhouses have their own distribution systems, and sell directly to retail outlets or supermarkets rather than wholesalers.

Turkey meat production is expected to continue to grow in 2000. Most of the turkey meat produced in Poland is processed and turkey is often used in place of pork in sausages. Compared with other meats, there is no tradition of fresh turkey meat consumption. However, consumption has begun to increase as prices of fresh and frozen turkey (imported) become more competitive and as Poles perceive it as a healthier product.

Consumption of chicken and turkey meat continue to grow as Poles become more health conscious and substitute poultry for other meats such as beef or pork. The growing number of fast food restaurants has stimulated demand for poultry meat. Other factors which are promoting poultry consumption include relatively lower prices of poultry meat compared with red meats. In 2000, the average per capita consumption of poultry meat amounted to 14.3 kilograms - a slight increase from 13.9 kilograms in 1999.

Poland's foreign trade balance of poultry meat in 2000 was positive and amounted to \$77.2 million. In 2000, exports of poultry meat and products to the EU increased by 3,500 tons which did not compensate for the decrease in sales to the Eastern Europe markets. Shipments of poultry meat to the EU amounted to 68 percent of total exports. Goose meat and offal are the major Polish export items (44 percent of total exports of poultry meat), followed by turkey meat (20 percent) and chicken meat (16 percent).

Total 2000 imports of poultry meat decreased by 2 percent because of higher domestic production and veterinary ban for imports of MDM for processing into sausages which are primarily exported to Russia. Imports of poultry meat from the United States increased by 24 percent in 2000. The increase in imports from the U.S. reflected higher overall demand for frozen turkey for processing as well as chicken leg quarters for the fast-food sector. In 2000, GOV reduced tariff preferences for poultry meat imported from Hungary which caused a decrease of imports from this country and allowed for higher imports from the U.S. As a part of the Poland - EU accession agreement, Poland established in March 2001 a 21,000 ton import quota for poultry meat from the EU. Within quota tariff for the EU is 0 percent. Elimination of tariff for the EU and relatively low exchange rate of Euro to Polish zloty may result in a significant increase of imports of poultry meat from the EU at the expense of imports from the U.S. and Canada in 2001 and 2002.

All poultry meat imported into Poland must be accompanied by a health certificate issued by a government-approved veterinarian from the exporting country. For products sold in Poland and stored in the country for transshipment in addition suppliers must also meet Poland's standards for storage conditions of poultry meat and validity of the products depending on conditions and temperature of storage. (See Gain Report #1002 on Polish Norms). Each box containing poultry meat must be labeled in Polish and should include the date of production expressed in numbers (not as a bar code), along with the name of the producer and the product's name.

In 2001, the import quota for poultry meat is 47,736 tons compared with 43,512 tons in 2000. The within quota tariff rate is 30 percent (min. 0.3 EUR/kg) while the above quota tariff rate is 60 percent (min. 0.6 EUR/kg). In 2000, only 31 percent of the quota was utilized. Poland remains an important transshipment point for U.S. poultry meat to Ukraine and other parts of the FSU.

To qualify for the within quota tariff rate, importers of poultry meat must obtain a permit from the Ministry of Agriculture for each contract. Multiple permits are often required as the Ministry of Agriculture issues permits for a maximum of 100 MT at one time. After documenting that the product has been sold, the importer may apply for another permit. Traders complain that this procedure is a major obstacle in importing poultry meat.

Maintaining the U.S. share of the Polish market will increasingly depend on U.S. promotional activities stressing product quality in the face of rules such as smaller permit levels which seemed designed to protect Polish poultry production. Apart from sales to importing firms, there is also an opportunity for direct sales to processors interested in joint ventures or poultry meat to be processed and re-exported to Russia or Ukraine. USDA export credit guarantee programs (GSM-102 and Supplier Credit) are available to support sales of U.S. poultry meat to Poland.

Poland is self sufficient in eggs although it does import some hatching eggs. Sixty percent of the eggs are produced in commercial facilities. Since the last quarter of 1999, egg production has been profitable and domestic production has expanded. Egg production in 2001 is expected to increase two percent, and another one percent next year, in response to lower feed prices and improved profitability. It is expected that consumption of eggs will grow in 2001 and 2002 as prices for eggs remain stable while meat prices grow due to shortages. In 2000, Poland's imports of eggs were estimated at 69 million pieces, down 18 percent from the 1999 figure. Imports are expected to remain at this year's level in 2001 due to a stable demand for hatching eggs.

*Other reports of interest:*

- Gain Report #1002 "Polish Norms"
- Gain Report #1022 "Livestock and Products"
- Gain Report #0037 "Dairy Annual"
- Gain Report #1014 "Annual Grain&Feed"

## II. Statistical Tables

PSD, Poultry, Meat, Total

|                             |                      |         |             |         |                     |         |
|-----------------------------|----------------------|---------|-------------|---------|---------------------|---------|
| PSD Table                   |                      |         |             |         |                     |         |
| Country                     | Poland               |         |             | x       |                     |         |
| Commodity                   | Poultry, Meat, Total |         |             |         | (1000 MT)(MIL HEAD) |         |
|                             | Revised              | 2000    | Preliminary | 2001    | Forecast            | 2002    |
|                             | Old                  | New     | Old         | New     | Old                 | New     |
| Market Year Begin           |                      | 01/2000 |             | 01/2001 |                     | 01/2002 |
| Inventory (Reference)       | 0                    | 0       | 0           | 0       | 0                   | 0       |
| Slaughter (Reference)       | 0                    | 0       | 0           | 0       | 0                   | 0       |
| Beginning Stocks            | 10                   | 10      | 10          | 10      | 10                  | 19      |
| Production                  | 580                  | 580     | 550         | 620     | 0                   | 630     |
| Whole, Imports              | 0                    | 0       | 0           | 0       | 0                   | 0       |
| Parts, Imports              | 17                   | 13      | 20          | 14      | 0                   | 15      |
| Intra EC Imports            | 0                    | 0       | 0           | 0       | 0                   | 0       |
| Other Imports               | 0                    | 0       | 0           | 0       | 0                   | 0       |
| TOTAL Imports               | 17                   | 13      | 20          | 14      | 0                   | 15      |
| TOTAL SUPPLY                | 607                  | 603     | 580         | 644     | 10                  | 664     |
| Whole, Exports              | 0                    | 1       | 0           | 0       | 0                   | 0       |
| Parts, Exports              | 45                   | 32      | 40          | 35      | 0                   | 40      |
| Intra EC Exports            | 0                    | 0       | 0           | 0       | 0                   | 0       |
| Other Exports               | 0                    | 0       | 0           | 0       | 0                   | 0       |
| TOTAL Exports               | 45                   | 33      | 40          | 35      | 0                   | 40      |
| Human Consumption           | 552                  | 560     | 530         | 590     | 0                   | 600     |
| Other Use, Losses           | 0                    | 0       | 0           | 0       | 0                   | 0       |
| Total Dom. Consumption      | 552                  | 560     | 530         | 590     | 0                   | 600     |
| TOTAL Use                   | 597                  | 593     | 570         | 625     | 0                   | 640     |
| Ending Stocks               | 10                   | 10      | 10          | 19      | 0                   | 24      |
| TOTAL DISTRIBUTION          | 607                  | 603     | 580         | 644     | 0                   | 664     |
| Calendar Yr. Imp. from U.S. | 7                    | 8       | 8           | 7       | 0                   | 6       |

## Import Trade Matrix , Poultry Meat, Total

|                     |        |  |  |
|---------------------|--------|--|--|
| Import Trade Matrix |        |  |  |
| Country             | Poland |  |  |

|                   |                         |                 |       |
|-------------------|-------------------------|-----------------|-------|
| Commodity         | Poultry, Meat,<br>Total |                 |       |
| Time period       | Jan-Dec                 | Units:          | tons  |
| Imports for:      | 1999                    |                 | 2000  |
| U.S.              | 6505                    | U.S.            | 8042  |
| Others            |                         | Others          |       |
| Canada            | 1084                    | Canada          | 1240  |
| The Netherlands   | 1385                    | The Netherlands | 862   |
| Hungary           | 3704                    | Hungary         | 838   |
| France            | 582                     | France          | 683   |
| Great Britain     | 98                      | Great Britain   | 696   |
| Denmark           | 85                      | Denmark         | 340   |
| Italy             | 80                      | Italy           | 322   |
| Belgium           | 17                      | Belgium         | 117   |
| Germany           | 40                      | Germany         | 184   |
| Ukraine           | 0                       | Ukraine         | 49    |
| Total for Others  | 7075                    |                 | 5331  |
| Others not Listed | 153                     |                 | 40    |
| Grand Total       | 13733                   |                 | 13413 |

Export Trade Matrix , Poultry Meat, Total

|                     |        |  |  |
|---------------------|--------|--|--|
| Export Trade Matrix |        |  |  |
| Country             | Poland |  |  |

|                   |                         |               |       |
|-------------------|-------------------------|---------------|-------|
| Commodity         | Poultry, Meat,<br>Total |               |       |
| Time period       | Jan-Dec                 | Units:        | tons  |
| Exports for:      | 1999                    |               | 2000  |
| U.S.              |                         | U.S.          |       |
| Others            |                         | Others        |       |
| Germany           | 19291                   | Germany       | 20188 |
| Russia            | 13347                   | Russia        | 3147  |
| France            | 2521                    | France        | 2754  |
| Belarus           | 1608                    | Belarus       | 1245  |
| Ukraine           | 1298                    | Ukraine       | 787   |
| Hong Kong         | 0                       | Hong Kong     | 994   |
| China             | 0                       | China         | 759   |
| Italy             | 425                     | Italy         | 1221  |
| Great Britain     | 496                     | Great Britain | 270   |
| Hungary           | 259                     | Hungary       | 217   |
| Total for Others  | 39245                   |               | 31582 |
| Others not Listed | 4710                    |               | 1373  |
| Grand Total       | 43955                   |               | 32955 |

## Producers Price of Chicken Broilers

|              |        |  |  |
|--------------|--------|--|--|
| Prices Table |        |  |  |
| Country      | Poland |  |  |

|               |                         |                         |                            |
|---------------|-------------------------|-------------------------|----------------------------|
| Commodity     | Poultry, Meat,<br>Total |                         |                            |
| Prices in     | zlotys                  | per uom                 | kilogram of live<br>weight |
|               |                         |                         |                            |
| Year          | 2000                    | 2001                    | % Change                   |
| Jan           | 2.99                    | 3.42                    | 14.38%                     |
| Feb           | 3                       | 3.48                    | 16.00%                     |
| Mar           | 3.08                    | 3.47                    | 12.66%                     |
| Apr           | 3.11                    | 3.48                    | 11.90%                     |
| May           | 3.2                     | 3.45                    | 7.81%                      |
| Jun           | 3.31                    |                         |                            |
| Jul           | 3.41                    |                         |                            |
| Aug           | 3.44                    |                         |                            |
| Sep           | 3.37                    |                         |                            |
| Oct           | 3.35                    |                         |                            |
| Nov           | 3.3                     |                         |                            |
| Dec           | 3.37                    |                         |                            |
|               |                         |                         |                            |
| Exchange Rate | 4.2                     | Local currency/US<br>\$ |                            |

PSD, Poultry, Meat, Chicken - 16 weeks

|           |        |  |  |  |  |  |
|-----------|--------|--|--|--|--|--|
| PSD Table |        |  |  |  |  |  |
| Country   | Poland |  |  |  |  |  |



| Commodity                   | Plty, Meat, Chicken - 16 wks |         |             | (1000 MT)(MIL HEAD) |          |         |
|-----------------------------|------------------------------|---------|-------------|---------------------|----------|---------|
|                             | Revised                      | 2000    | Preliminary | 2001                | Forecast | 2002    |
|                             | Old                          | New     | Old         | New                 | Old      | New     |
| Market Year Begin           |                              | 01/2000 |             | 01/2001             |          | 01/2002 |
| Inventory (Reference)       | 0                            | 0       | 0           | 0                   | 0        | 0       |
| Slaughter (Reference)       | 0                            | 0       | 0           | 0                   | 0        | 0       |
| Beginning Stocks            | 10                           | 5       | 10          | 6                   | 10       | 7       |
| Production                  | 370                          | 370     | 355         | 400                 | 0        | 420     |
| Whole, Imports              | 0                            | 0       | 0           | 0                   | 0        | 0       |
| Parts, Imports              | 11                           | 8       | 13          | 8                   | 0        | 7       |
| Intra EC Imports            | 0                            | 0       | 0           | 0                   | 0        | 0       |
| Other Imports               | 0                            | 0       | 0           | 0                   | 0        | 0       |
| TOTAL Imports               | 11                           | 8       | 13          | 8                   | 0        | 7       |
| TOTAL SUPPLY                | 391                          | 383     | 378         | 414                 | 10       | 434     |
| Whole, Exports              | 0                            | 0       | 0           | 1                   | 0        | 1       |
| Parts, Exports              | 13                           | 7       | 11          | 6                   | 0        | 7       |
| Intra EC Exports            | 0                            | 0       | 0           | 0                   | 0        | 0       |
| Other Exports               | 0                            | 0       | 0           | 0                   | 0        | 0       |
| TOTAL Exports               | 13                           | 7       | 11          | 7                   | 0        | 8       |
| Human Consumption           | 368                          | 370     | 357         | 400                 | 0        | 415     |
| Other Use, Losses           | 0                            | 0       | 0           | 0                   | 0        | 0       |
| Total Dom. Consumption      | 368                          | 370     | 357         | 400                 | 0        | 415     |
| TOTAL Use                   | 381                          | 377     | 368         | 407                 | 0        | 423     |
| Ending Stocks               | 10                           | 6       | 10          | 7                   | 0        | 11      |
| TOTAL DISTRIBUTION          | 391                          | 383     | 378         | 414                 | 0        | 434     |
| Calendar Yr. Imp. from U.S. | 5                            | 6       | 5           | 6                   | 0        | 7       |

## Import Trade Matrix, Chicken - 16 weeks

|                     |        |  |  |
|---------------------|--------|--|--|
| Import Trade Matrix |        |  |  |
| Country             | Poland |  |  |

|                   |                               |                 |      |
|-------------------|-------------------------------|-----------------|------|
| Commodity         | Pty, Meat, Chicken<br>-16 wks |                 |      |
| Time period       | Jan-Dec                       | Units:          | Tons |
| Imports for:      | 1999                          |                 | 2000 |
| U.S.              | 5365                          | U.S.            | 6212 |
| Others            |                               | Others          |      |
| Hungary           | 1401                          | Hungary         | 187  |
| The Netherlands   | 1322                          | The Netherlands | 707  |
| Denmark           | 576                           | Denmark         | 320  |
| Canada            | 209                           | Canada          | 25   |
| Estonia           | 42                            | Italy           | 12   |
| Russia            | 20                            | Germany         | 43   |
| Iceland           | 20                            | Ukraine         | 49   |
| Belarus           | 19                            | France          | 23   |
| Ukraine           | 10                            | Belgium         | 17   |
| Belgium           | 3                             | Dzibuti         | 20   |
| Total for Others  | 3622                          |                 | 1403 |
| Others not Listed | 1                             |                 | 0    |
| Grand Total       | 8988                          |                 | 7615 |

## Export Trade Matrix, Chicken - 16 weeks

|                     |        |  |  |
|---------------------|--------|--|--|
| Export Trade Matrix |        |  |  |
| Country             | Poland |  |  |

|                   |                                |               |      |
|-------------------|--------------------------------|---------------|------|
| Commodity         | Ptty, Meat, Chicken<br>-16 wks |               |      |
| Time period       | Jan - Dec                      | Units:        | Tons |
| Exports for:      | 1999                           |               | 2000 |
| U.S.              |                                | U.S.          |      |
| Others            |                                | Others        |      |
| Russia            | 3617                           | Russia        | 756  |
| Germany           | 3414                           | Germany       | 2701 |
| France            | 1688                           | France        | 1936 |
| Ukraine           | 1106                           | Ukraine       | 725  |
| Moldavia          | 799                            | Moldavia      | 38   |
| Byelarus          | 438                            | Byelarus      | 14   |
| Great Britain     | 308                            | Great Britain | 52   |
| Azerbaijan        | 0                              | Azerbaijan    | 660  |
| Hungary           | 259                            | Hungary       | 217  |
| Romania           | 0                              | Romania       | 139  |
| Total for Others  | 11629                          |               | 7238 |
| Others not Listed | 1449                           |               | 100  |
| Grand Total       | 13078                          |               | 7338 |

## Retail Price of Chicken Broilers

|              |        |  |  |
|--------------|--------|--|--|
| Prices Table |        |  |  |
| Country      | Poland |  |  |

|               |                                |                         |                                |
|---------------|--------------------------------|-------------------------|--------------------------------|
| Commodity     | Plty, Meat, Chicken<br>-16 wks |                         |                                |
| Prices in     | zlotys                         | per uom                 | kilogram of dressed<br>chicken |
|               |                                |                         |                                |
| Year          | 2000                           | 2001                    | % Change                       |
| Jan           | 5.02                           | 6.64                    | 32.27%                         |
| Feb           | 5.09                           | 6.28                    | 23.38%                         |
| Mar           | 5.34                           | 6                       | 12.36%                         |
| Apr           | 5.6                            | 6.06                    | 8.21%                          |
| May           | 6.14                           | 6.02                    | -1.95%                         |
| Jun           | 6.3                            |                         |                                |
| Jul           | 6.32                           |                         |                                |
| Aug           | 6.25                           |                         |                                |
| Sep           | 6                              |                         |                                |
| Oct           | 5.63                           |                         |                                |
| Nov           | 5.53                           |                         |                                |
| Dec           | 5.88                           |                         |                                |
|               |                                |                         |                                |
| Exchange Rate | 4.2                            | Local currency/US<br>\$ |                                |

## PSD, Poultry, Meat, Turkey

|           |                       |      |             |      |                     |      |
|-----------|-----------------------|------|-------------|------|---------------------|------|
| PSD Table |                       |      |             |      |                     |      |
| Country   | Poland                |      |             |      |                     |      |
| Commodity | Poultry, Meat, Turkey |      |             |      | (1000 MT)(MIL HEAD) |      |
|           | Revised               | 2000 | Preliminary | 2001 | Forecast            | 2002 |

|                             | Old | New     | Old | New     | Old | New     |
|-----------------------------|-----|---------|-----|---------|-----|---------|
| Market Year Begin           |     | 01/2000 |     | 01/2001 |     | 01/2002 |
| Inventory (Reference)       | 0   | 0       | 0   | 0       | 0   | 0       |
| Slaughter (Reference)       | 0   | 0       | 0   | 0       | 0   | 0       |
| Beginning Stocks            | 0   | 4       | 0   | 4       | 0   | 10      |
| Production                  | 85  | 85      | 87  | 105     | 0   | 115     |
| Whole, Imports              | 0   | 0       | 0   | 0       | 0   | 0       |
| Parts, Imports              | 6   | 6       | 7   | 5       | 0   | 5       |
| Intra EC Imports            | 0   | 0       | 0   | 0       | 0   | 0       |
| Other Imports               | 0   | 0       | 0   | 0       | 0   | 0       |
| TOTAL Imports               | 6   | 6       | 7   | 5       | 0   | 5       |
| TOTAL SUPPLY                | 91  | 95      | 94  | 114     | 0   | 130     |
| Whole, Exports              | 0   | 0       | 0   | 0       | 0   | 0       |
| Parts, Exports              | 14  | 9       | 15  | 9       | 0   | 8       |
| Intra EC Exports            | 0   | 0       | 0   | 0       | 0   | 0       |
| Other Exports               | 0   | 0       | 0   | 0       | 0   | 0       |
| TOTAL Exports               | 14  | 9       | 15  | 9       | 0   | 8       |
| Human Consumption           | 77  | 82      | 79  | 95      | 0   | 110     |
| Other Use, Losses           | 0   | 0       | 0   | 0       | 0   | 0       |
| Total Dom. Consumption      | 77  | 82      | 79  | 95      | 0   | 110     |
| TOTAL Use                   | 91  | 91      | 94  | 104     | 0   | 118     |
| Ending Stocks               | 0   | 4       | 0   | 10      | 0   | 12      |
| TOTAL DISTRIBUTION          | 91  | 95      | 94  | 114     | 0   | 130     |
| Calendar Yr. Imp. from U.S. | 2   | 2       | 2   | 2       | 0   | 2       |

## Import Trade Matrix, Meat, Turkey

|                     |                          |        |      |
|---------------------|--------------------------|--------|------|
| Import Trade Matrix |                          |        |      |
| Country             | Poland                   |        |      |
| Commodity           | Poultry, Meat,<br>Turkey |        |      |
| Time period         | Jan-Dec                  | Units: | tons |

|                   |      |                 |      |
|-------------------|------|-----------------|------|
| Imports for:      | 1999 |                 | 2000 |
| U.S.              | 1140 | U.S.            | 2049 |
| Others            |      | Others          |      |
| Hungary           | 2268 | Hungary         | 499  |
| Canada            | 874  | Canada          | 1215 |
| Italy             | 80   | Italy           | 310  |
| Germany           | 40   | Germany         | 100  |
| France            | 571  | France          | 659  |
| The Netherlands   | 63   | The Netherlands | 155  |
| Great Britain     | 77   | Great Britain   | 696  |
| Belgium           | 14   | Belgium         | 100  |
| Denmark           | 27   | Denmark         | 20   |
|                   |      | Byelorussia     | 19   |
| Total for Others  | 4014 |                 | 3773 |
| Others not Listed | 42   |                 | 0    |
| Grand Total       | 5196 |                 | 5822 |

## Export Trade Matrix, Meat, Turkey

|                     |                          |        |      |
|---------------------|--------------------------|--------|------|
| Export Trade Matrix |                          |        |      |
| Country             | Poland                   |        |      |
| Commodity           | Poultry, Meat,<br>Turkey |        |      |
| Time period         | Jan-Dec                  | Units: | tons |
| Exports for:        | 1999                     |        | 2000 |

|                   |       |                 |      |
|-------------------|-------|-----------------|------|
| U.S.              |       | U.S.            |      |
| Others            |       | Others          |      |
| Russia            | 9309  | Russia          | 2319 |
| Belarus           | 1175  | Belarus         | 1185 |
| Germany           | 1198  | Germany         | 3979 |
| Italy             | 302   | Italy           | 906  |
| Ukraine           | 145   | Ukraine         | 28   |
| Estonia           | 116   | Estonia         | 30   |
| Great Britain     | 92    | Great Britain   | 217  |
| Slovak Republic   | 60    | Slovak Republic | 57   |
| Moldavia          | 59    | Switzerland     | 111  |
| France            | 40    | Austria         | 138  |
| Total for Others  | 12496 |                 | 8970 |
| Others not Listed | 189   |                 | 414  |
| Grand Total       | 12685 |                 | 9384 |

## PSD, Poultry, Eggs

|                   |               |         |             |         |                     |         |
|-------------------|---------------|---------|-------------|---------|---------------------|---------|
| PSD Table         |               |         |             |         |                     |         |
| Country           | Poland        |         |             |         |                     |         |
| Commodity         | Poultry, Eggs |         |             |         | (MIL HEAD)(MIL PCS) |         |
|                   | Revised       | 2000    | Preliminary | 2001    | Forecast            | 2002    |
|                   | Old           | New     | Old         | New     | Old                 | New     |
| Market Year Begin |               | 01/2000 |             | 01/2001 |                     | 01/2002 |
| Layers            | 55            | 55      | 56          | 56      | 0                   | 57      |

|                             |      |      |      |      |     |      |
|-----------------------------|------|------|------|------|-----|------|
| Beginning Stocks            | 120  | 167  | 100  | 165  | 100 | 182  |
| Production                  | 7600 | 7750 | 7700 | 7900 | 0   | 8000 |
| Hatch Eggs, Imports         | 40   | 40   | 40   | 40   | 0   | 40   |
| Shell Eggs, Imports         | 60   | 29   | 60   | 30   | 0   | 30   |
| Other Imports               | 0    | 0    | 0    | 0    | 0   | 0    |
| Intra EC Imports            | 0    | 0    | 0    | 0    | 0   | 0    |
| TOTAL Imports               | 100  | 69   | 100  | 70   | 0   | 70   |
| TOTAL SUPPLY                | 7820 | 7986 | 7900 | 8135 | 100 | 8252 |
| Hatch Eggs, Exports         | 0    | 0    | 0    | 0    | 0   | 0    |
| Shell Eggs, Exports         | 30   | 21   | 30   | 20   | 0   | 20   |
| Other Exports               | 0    | 0    | 0    | 0    | 0   | 0    |
| Intra EC Exports            | 0    | 0    | 0    | 0    | 0   | 0    |
| TOTAL Exports               | 30   | 21   | 30   | 20   | 0   | 20   |
| Hatch Eggs, Consumption     | 410  | 425  | 420  | 433  | 0   | 440  |
| Shell Eggs, Human           | 6955 | 7050 | 7050 | 7200 | 0   | 7300 |
| Shell Eggs, OT Use/Loss     | 25   | 25   | 0    | 0    | 0   | 0    |
| Other Dom. Consumption      | 300  | 300  | 300  | 300  | 0   | 300  |
| Total Dom. Consumption      | 7690 | 7800 | 7770 | 7933 | 0   | 8040 |
| TOTAL Use                   | 7720 | 7821 | 7800 | 7953 | 0   | 8060 |
| Ending Stocks               | 100  | 165  | 100  | 182  | 0   | 192  |
| TOTAL DISTRIBUTION          | 7820 | 7986 | 7900 | 8135 | 0   | 8252 |
| Calendar Yr. Imp. from U.S. | 2    | 0    | 2    | 0    | 0   | 0    |

## Import Trade Matrix, Eggs

|                     |               |                |              |
|---------------------|---------------|----------------|--------------|
| Import Trade Matrix |               |                |              |
| Country             | Poland        |                |              |
| Commodity           | Poultry, Eggs |                |              |
| Time period         | Jan-Dec       | Units:         | 1,000 pieces |
| Imports for:        | 1999          |                | 2000         |
| U.S.                | 1080          | U.S.           | 217          |
| Others              |               | Others         |              |
| Czech Republic      | 10422         | Czech Republic | 12060        |



|                   |       |                 |       |
|-------------------|-------|-----------------|-------|
| France            | 8640  | France          | 7734  |
| Slovak Republic   | 1314  | Slovak Republic | 563   |
| Denmark           | 1944  | Denmark         | 2106  |
| The Netherlands   | 15264 | The Netherlands | 16830 |
| Canada            | 252   | Canada          | 307   |
| Hungary           | 180   | Latvia          | 5053  |
| India             | 34560 | India           | 17337 |
| Russia            | 2016  | Austria         | 4277  |
| Belgium           | 6624  | Israel          | 259   |
| Total for Others  | 81216 |                 | 66526 |
| Others not Listed | 2124  |                 | 2262  |
| Grand Total       | 84420 |                 | 69005 |

## Export Trade Matrix, Eggs

|                     |               |                |              |
|---------------------|---------------|----------------|--------------|
| Export Trade Matrix |               |                |              |
| Country             | Poland        |                |              |
| Commodity           | Poultry, Eggs |                |              |
| Time period         | Jan-Dec       | Units:         | 1,000 pieces |
| Exports for:        | 1999          |                | 2000         |
| U.S.                |               | U.S.           |              |
| Others              |               | Others         |              |
| Belgium             | 5400          | Czech Republic | 13084        |
| Switzerland         | 4950          | Switzerland    | 3013         |

|                   |       |                 |       |
|-------------------|-------|-----------------|-------|
| Germany           | 4914  | Bahama          | 856   |
| Latvia            | 4428  | Latvia          | 321   |
| The Netherlands   | 3168  | Yugoslavia      | 188   |
| Lithuania         | 2952  | Lithuania       | 301   |
| Argentina         | 1584  | Liberia         | 75    |
| Romania           | 486   | Hungary         | 47    |
| Slovak Republic   | 504   | Slovak Republic | 2101  |
| Sweden            | 360   | Norway          | 28    |
| Total for Others  | 28746 |                 | 20014 |
| Others not Listed | 3168  |                 | 989   |
| Grand Total       | 31914 |                 | 21003 |

## Retail Prices for Table Eggs

|              |               |         |            |
|--------------|---------------|---------|------------|
| Prices Table |               |         |            |
| Country      | Poland        |         |            |
| Commodity    | Poultry, Eggs |         |            |
| Prices in    | zlotys        | per uom | 100 pieces |
|              |               |         |            |
| Year         | 2000          | 2001    | % Change   |
| Jan          | 34            | 36      | 5.88%      |
| Feb          | 34            | 36      | 5.88%      |
| Mar          | 33            | 36      | 9.09%      |
| Apr          | 33            | 36      | 9.09%      |

|               |     |                         |       |
|---------------|-----|-------------------------|-------|
| May           | 32  | 35                      | 9.38% |
| Jun           | 31  |                         |       |
| Jul           | 31  |                         |       |
| Aug           | 33  |                         |       |
| Sep           | 34  |                         |       |
| Oct           | 35  |                         |       |
| Nov           | 35  |                         |       |
| Dec           | 36  |                         |       |
|               |     |                         |       |
| Exchange Rate | 4.2 | Local currency/US<br>\$ |       |

Average Meat Consumption  
(kilograms per capita )

|      | Pork | Beef | Poultry |
|------|------|------|---------|
| 1997 | 35.4 | 8.3  | 12.4    |
| 1998 | 37.6 | 8.1  | 13.1    |
| 1999 | 39.6 | 7.8  | 13.9    |
| 2000 | 37.8 | 7.3  | 14.3    |
| 2001 | 35.5 | 6.0  | 15.8    |